JANEK
Performance Group

Your Sales Kickoff:

An essential checklist to help you crush your team's goals

As you prepare for your next sales kickoff, it's important to make every step count. To help, we've created a checklist so that you can cover your bases:

1. Pre-Kickoff Prep—Gear up and dig in!

- [ ] **Set Goals for the Kickoff**: Make it clear what the purpose of the kickoff is, setting objectives such as skill development, product knowledge and team alignment.
- [ ] **Conduct Pre-Kickoff Surveys:** Create team direction by gathering feedback on challenges, skill gaps and areas where the team feels they need support.
- [ ] **Compile Success Stories and Case Studies:** Show what your team can do! Provide examples from the past year to motivate and inform strategies.

2. Sales Training—Is your team's training still relevant?

- [ ] **Skill-Building Sessions:** Sales are always changing—and so do customers, becoming more sophisticated as they seek solutions. Include modules on negotiation, objection handling, closing techniques, and relationship-building.
- [ ] **Industry-Specific Sales Training:** No two organizations are the same—and neither are sales teams! Craft tailored sessions to deepen expertise in your target industries.
- [ ] **Customer-Centric Sales Approaches:** Reinforce customer-focused communication, active listening and value proposition.
- [ ] **Competitive Landscape and Market Trends:** It's important to help your team set their sights ahead; update the team on current market dynamics and competitor moves.
- [ ] **Role-Playing Scenarios:** Conduct role-play exercises to practice real-world sales and customer interactions.

3. Technology and Tools Review—Is your team equipped with what they need?

- [ ] **CRM and Sales Technology Deep-Dive:** Review CRM tools, automation systems and data analytics software.
- [ ] **Tech Demo Sessions:** Provide hands-on demos of new tools or updates to ensure everyone understands their usage. Consider training sessions—the investment you make now will create vital impacts later!
- [ ] **Data Utilization for Sales Intelligence:** Train your team on using data for lead scoring, account prioritization, and personalized outreach.

4. Product Knowledge—What's changed?

- [ ] **New Product Updates:** Present new features, services or products launching in the future.
- [ ] **Product Use Cases and Differentiators:** Highlight specific use cases and unique selling points.
- [ ] **Product Q&A Panel:** Arrange an open forum with product experts for in-depth Q&A.

5. Account Planning and Strategy—Pipelines, Playbooks and everything in-between

- [ ] **Account Segmentation and Targeting:** Review ideal customer profiles, segmentation strategies and target account lists.
- [ ] **Top Account Playbooks:** Develop playbooks for your team's biggest accounts.
- [ ] **Pipeline Review and Opportunity Mapping:** Assess the pipeline for Q1 and create strategies for high-value opportunities.
- [ ] **Account Planning Workshops:** Conduct workshops for teams to create account strategies and set vital goals for key accounts.

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6. Sales Enablement and Content Review—Call out those wins!

- [ ] **Sales Collateral Updates:** Introduce new case studies, brochures and content specific to your products and organization.
- [ ] **Customer Success Stories:** Highlight wins to inspire the team and show how their impact makes a difference.
- [ ] **Personalized Outreach Templates:** Update email and messaging templates with a customer-centric approach.

7. Inspiration and Motivation—Get inspired!

- [ ] **Guest Speakers:** Invite industry leaders or top clients to speak on trends and customer expectations.
- [ ] **Recognition of Top Performers:** Celebrate top performers with awards, stories and recognition.
- [ ] **Set Clear Goals:** Have each team member set personal and team goals for the year ahead.

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8. Team Building and Culture Building—Better Together

- [ ] **Icebreakers and Team-Building Activities:** Despite the day-to-day, it isn't always easy to learn about your colleagues. Engage in activities that strengthen team bonds.
- [ ] **Sales Culture Workshop:** Discuss and align on company values, sales culture and best practices.
- [ ] **Feedback and Open Forum:** Provide a session for team feedback, concerns and suggestions.

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9. Post-Kickoff Follow-Up

- [ ] **Action Plan Assignments:** Ensure every participant leaves with a clear action plan.
- [ ] **Schedule Follow-Up Coaching Sessions:** Plan check-ins to track progress on training and goals.
- [ ] **Measure Success of Kickoff:** Use post-kickoff surveys and sales performance metrics to evaluate impact.

If you have any questions, never hesitate to reach out to us—**we're here to guide, support and work with you to reach your revenue goals and up those win rates for your team!**